

South America Animal Protein - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The South America Animal Protein Market size is estimated at USD 596.05 million in 2024, and is expected to reach USD 734.58 million by 2029, growing at a CAGR of 4.27% during the forecast period (2024-2029).

Prominent application based on functionality and suitability with growing demand protein-enriched products drive the food and beverages sector

- By end-user, the F&B industry is the leading application sector for animal protein in the region. The key sub-segments of the F&B segment are bakery and dairy/dairy alternatives, both of which accounted for more than 46% of the total volume in 2022. Gelatin remains the most used protein in the bakery sector as it adds protein and acts as a transparent gelling and thickening agent in baked goods.

- In addition to the F&B segment, the supplements segment had the highest application share, with 78% of the application dominated by the sports nutrition sub-segment in 2022, primarily due to rising obesity across the region. Argentina, whose 28.3% of the population is overweight, was the most obese country in South America in 2021. With 28% of its population obese, Chile ranks second. With 27.9%, Uruguay ranks third. However, the whey protein-enriched personal care sector is projected to register the highest CAGR value of 4.43% in (2023-2029), owing to its functionalities as a skin smoothening and hair conditioning agent.

- Dairy and dairy alternatives is another important segment for animal proteins in the region, and it recorded a CAGR of 3.19% during the study period. The rise in sales comes with the usage of casein as a coagulant in cheese manufacture, along with the ongoing trend of protein fortification in the dairy desserts category. Manufacturers of products like ice creams and yogurts have launched protein-enriched versions of their existing products to make the "high protein" and "added protein" claims. As a result, after casein and caseinates (which has application in the cheese industry), whey protein and milk protein were the most used

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animal proteins in the segment. These proteins are also added to improve mouthfeel, viscosity, and structure.

Brazil followed by Rest of South America with increasing involvement in fitness and sports activities lead the segmental growth

- By country, Brazil claimed the largest share in 2022, with the animal protein demand from the F&B and supplements sectors dominating the sales. This high demand can be attributed to the country's aging population, which is estimated to triple by 2050, covering around 66 million Brazilians. In line with growing concerns, consumers are increasingly getting involved in fitness and sports activities, increasing the proportion of the non-athletic population among supplement consumers. As a result, Brazil is expected to record the fastest growth potential among all South American countries, with a CAGR of 6.72% during the forecast period.

- The dairy industry in the region is very well developed, so milk production is very high in South American countries. Brazil and Argentina are the major milk-producing countries in the continent. Chile and Uruguay are also emerging as major milk-producing countries. Therefore, the region always has a consistent supply of raw materials for dairy protein production. Dairy and dairy alternatives and bakery were the largest end-user segments for animal proteins in the region, representing over 46% of the total volume in 2022.

- Food and beverage was the largest end-user segment, with over 73.5% of the total volume of animal protein sales in the region. The majority of the sales in the segment come from the dairy and dairy alternatives sub-segment, which recorded a CAGR of 3.19% during the study period. South America produced 66.412 million ton of calf milk in 2020, which provided a sizable amount of the raw materials used to make dairy proteins. Due to the region's extensive milk production, key players like Arla and Fonterra have established dairy ingredient production plants.

South America Animal Protein Market Trends

Increasing preference for protein rich diet to influence consumption

- In South America, there is an increasing demand for health and wellness products, despite the economic crisis. Mobility-related health issues like osteoporosis, bone health, and joint health problems are among the most important concerns among consumers, thereby influencing collagen manufacturers to target dietary supplement manufacturers to cater to market demand. In 2018, Brazil had the highest consumption of health and wellness products accounting for over USD 21.7 billion. There is a rising prevalence of diseases, such as cardiovascular issues and diabetes. Such health factors are motivating consumers to opt for animal-based dietary supplements.

- South American consumers have a greater understanding of the relationship between diet and health, which is fueling the market's growth. The market's sales of protein-rich foods are being driven by the increased demand for functional and fortified foods. Consumers are inclined toward natural and organic foods to include in their daily diet. As of 2022, organic packaged food and beverage consumption in Argentina increased by almost 125% from 2020.

- Brazilian consumers have a strong preference for cosmetics, which is driving industry participants to boost their investments in the production of collagen and gelatin peptides for a variety of uses, including dietary supplements and cosmetics. In terms of skin health, an intake of 2.5 grams of collagen peptides is advisable in Brazil. Over the decade, the mortality rate increased by 16% in 2020 due to health concerns like rheumatoid arthritis, osteoporosis, and bone health. Thus, collagen peptide-based supplements are expected to witness significant demand over the forecast period.

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Milk and meat production contributes majorly as raw material for animal protein ingredients manufacturers

- Major animal protein forms use milk as their ultimate raw material for forming proteins, such as milk proteins, whey proteins, casein, and caseinates. After seeing volumes contract in 2019 due to unfavorable weather and economic conditions, milk production returned to a decisive growth rate in 2020. This achievement is being counteracted by the tremendous uncertainty brought about by the COVID-19 pandemic. In Argentina and Uruguay, year-to-date growth clocked in at 8.7% and 3.9%, respectively, during the first six months of 2020. Significant increases also have been witnessed by net importing countries along the continent's Pacific coast, namely Colombia and Chile.
- Argentina is also one of the major producers of milk in the region. Government policies, including trade interventionism and a heavy tax burden, continue to generate uncertainty and complicates operational planning resulting in reduced investment in the sector. Nevertheless, a 4% increase in 2021 total milk output compared to 2020. Good weather is the principal driver of this increased production, allowing farmers to reap production gains from their limited investment in nutritional and technological inputs.
- Animal proteins such as collagen and gelatin are derived from meat slaughtering activities in the region. Beef production throughout Brazil continues to increase, with investments leading to improved production efficiency, disease management, and supply chain traceability. Since the beginning of the millennium, Brazil has increased its beef production by 55%, or a staggering 3.7 million tonnes. Much of these productivity gains can be attributed to the increase in the size of their national herd, growing by almost 17 million heads over the course of 20 years.

South America Animal Protein Industry Overview

The South America Animal Protein Market is fragmented, with the top five companies occupying 14.13%. The major players in this market are Arla Foods amba, Darling Ingredients Inc., Kerry Group plc, Royal FrieslandCampina N.V and Saputo Inc (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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